



Statewide Voter Registration System Project

California Secretary of State

VoteCal Schedule Management Plan

Final v1.0

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REVISION SUMMARY

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0.2D	10/28/2011	J. Kerhlikar	Updated to include comments from IPOC and PMO.
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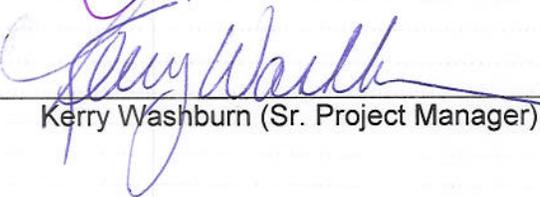
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1 Introduction

The California Secretary of State (SOS) is responsible for developing a statewide database and system for managing voter registration in compliance with the mandate of Section 303 of the Help America Vote Act (HAVA) of 2002. The HAVA mandate transfers many of the responsibilities for voter registration completeness and accuracy from county elections officials to the Secretary of State. The Statewide Voter Registration System Project (VoteCal) is intended to meet the following program objectives:

- Ensure the system is uniform, centralized, interactive, defined, and maintained at the State level.
- Ensure the system serves as the single system for storing and managing the official list of registered voters.
- Ensure the system is the official voter list for conducting elections.
- Provide interfaces for existing Election Management Systems (EMSs) to add, update, and retrieve registration and related data.
- Provide interfaces with the California Department of Public Health (CDPH) for updates from death records and with the California Department of Corrections and Rehabilitation (CDCR) for updates on felony status.
- Provide interface with the Department of Motor Vehicles (DMV) to verify registrant identity and to collect registration change of address updates.
- The SOS considers VoteCal to be a large-scale, complex information technology implementation project. Complexity arises from the following:
 - There are a large and diverse number of stakeholders with vested interest in the successful outcome of the project.
 - Virtually all election data requirements are dependent on the availability and accuracy of voter registration data.
 - The VoteCal implementation strategy involves modification to, coordination with, and interface with Election Management System (EMS) vendors; these EMSs are not the responsibility of either the SOS or the VoteCal System Integration Contractor (SI).
 - The VoteCal implementation will necessarily require modification of the current business practices and processes, as well as roles and responsibilities of State and county elections officials to effectively and efficiently administer HAVA-mandated responsibilities.

1.1 Purpose

Schedule Management is a process that is critical to effective management of the SOS VoteCal Project. The Schedule Management process defined in this plan is focused on tracking and reporting the status of deliverables and work products through a Consolidated Project Schedule (CPS), Integrated Project Schedule (IPS) from the SI and Individual Project Schedules (IDPSs) developed by SOS, EMSs and other supporting teams.

This Schedule Management Plan provides the standards for creating, monitoring and controlling the VoteCal Project schedules to help ensure that the data from the team schedules uniformly rolls up to the Consolidated Project Schedule with the use of “touch point” flags on specific tasks, enabling a comprehensive project view leading to the timely completion of the VoteCal Project. The standards, reports and controls described in this plan are the tools that the VoteCal Project Management Office (PMO) will use to gauge and report on overall project performance. The guidance provided here enables the VoteCal Project to mitigate negative trends and

address issues prior to reaching established project control limits as defined in the SOS VoteCal Change Control Plan. The plan provides descriptions of:

- Roles and responsibilities specific to schedule management
- The standards for structure of the CPS and the individual team schedules and how data in the different schedules is integrated
- Frequency and process of schedule updates
- How progress and performance is assessed and tracked
- How schedule progress is measured and reported
- How changes to the schedule are proposed and approved
- How and where the schedule files are maintained

1.2 Scope

The scope of this plan includes definition of the standards related to the development and reporting, of all VoteCal Project schedules and the development, management, analysis and maintenance of the Consolidated Project Schedule.

1.3 Assumptions and Constraints

The following assumptions and constraints were identified during the development of this Plan:

- The primary roles in schedule management are covered in this plan. Other Project roles are covered in the SOS VoteCal Human Resource Management Plan.
- This plan provides details of how the CPS and all related VoteCal project team schedules are standardized.
- The VoteCal Project has standards and processes for schedule management that apply and adapt industry best practices to the specific needs and constraints of the Project and SOS.
- The schedule management process aligns with guidelines set forth in the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK) and the California Technology Agency.
- The SI, EMS's and Interface Partners will execute schedule management best practice on their team specific schedules.

1.4 Acronyms

The current version of the SOS VoteCal Project Glossary is located at the following path in the Communications (Comm Mgmt) project folder:

\\sosfps4\sOS_SHARE\Projects\HAVA\SWDb\VoteCal\PM-n-Processes\Comm Mgmt\Proj Glossary

1.5 Document Maintenance

The Schedule Management Plan is a living document and will be amended or modified as needed throughout the life of the project. The plan will be updated if schedule management roles are added or revised, additional entities or responsibilities are formally assigned, or processes are revised to better fit the needs of the project. This document will be reviewed and needs for changes assessed, at a minimum, at the end of each phase of the VoteCal Project. This document contains a revision history log. When changes occur, the version number will be updated to the next increment and the date, author of the change and what has changed will be

recorded in the revision summary log of the document. The positions that the signatories of this document represent will approve new versions before they are published.

2 Approach

The SOS VoteCal Project schedule management approach involves development, maintenance, control, and archival of the CPS and individual team schedules. The CPS is owned and maintained by the SOS VoteCal PMO. The team schedules are maintained by the individual project teams. The CPS reflects key planning and tracking data, along with interdependencies, from multiple team-specific schedules. The individual team schedules include, but are not necessarily limited to:

- System Integration Contractor's Integrated Project Schedule (IPS)
- Secretary of State's (SOS) , Individual Project Schedule (IDPS)
- EMSs' Individual Project Schedule (IDPS)

VoteCal Schedule Management process focuses on the CPS lifecycle and schedule reporting. The SOS Department utilizes Microsoft Project 2007 as its scheduling tool.

2.1 Overview of Standards

Project schedules for VoteCal are developed using a standard Work Breakdown Structure (WBS). Key "synch points" are mutually agreed upon and progress reported from the team schedules and updated as part of the cyclical schedule management process. While individual teams manage work at a resource level using their team specific schedules VoteCal Project progress will be measured and tracked using the CPS. The CPS contains the details of coordination between these team schedules and the overall network of project activities. The CPS provides the PMO a single unified source of schedule data that accurately reflects the progress of the project.

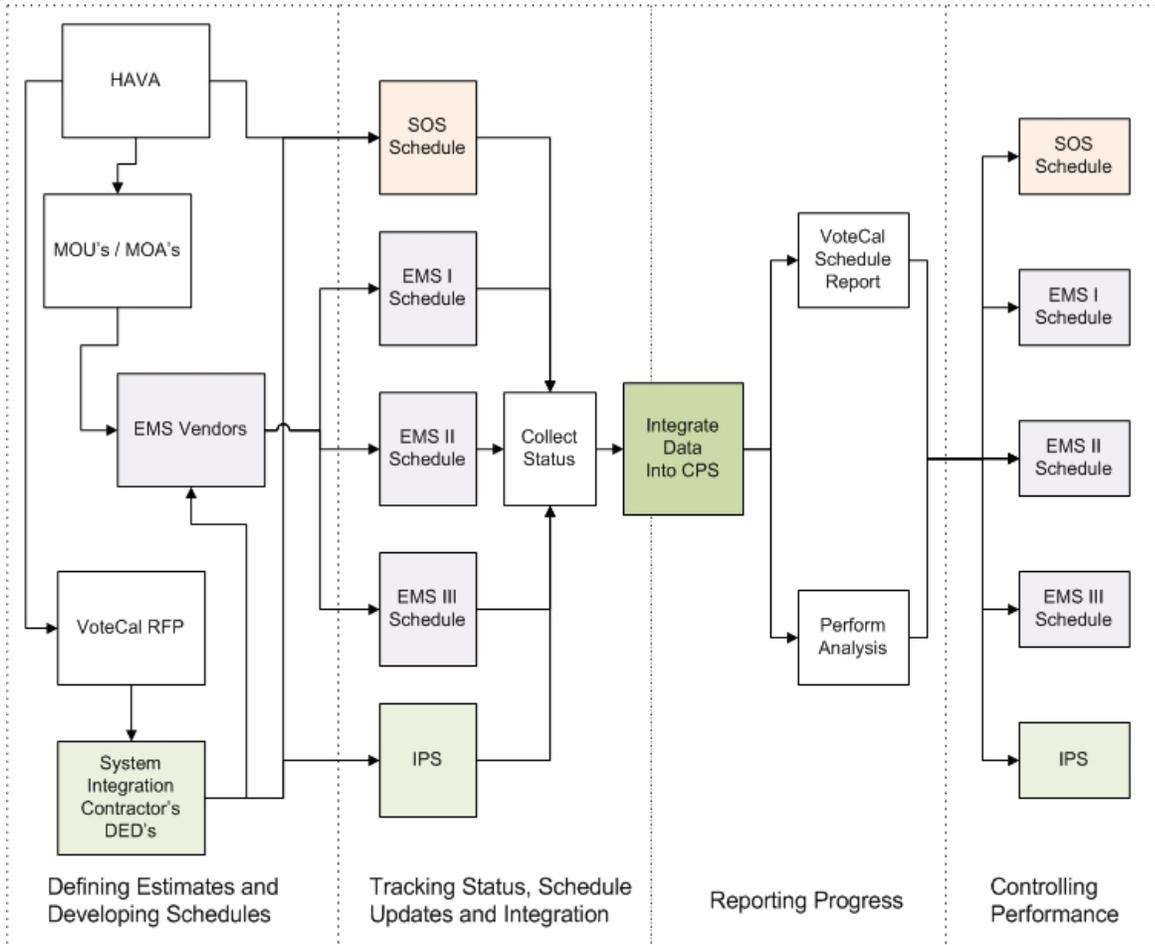
Initial schedule construction will occur within the first 90 days of SI contract execution. Thereafter team project schedules and the CPS update, reporting, and analysis is performed on a bi-weekly basis. Updated schedules are submitted in MS Project 2007 format by each team to the PMO who in turn is responsible for aggregating the status update into the CPS and analyzing the progress. Overall the approach for the CPS and the different team schedules consists of the following:

- Defining Estimates and Developing Schedules:
 - Activity definition
 - Task sequencing
 - Resource assignments
 - Duration estimation
 - Schedule submission and approval
- Schedule Integration, Updates and Tracking Status:
 - Estimated completion date
 - Inter-schedule analysis
- Reporting Progress:
 - Progress towards completion of milestones and deliverables
 - Duration variance
 - Schedule variance percentage
 - Overall project status
 - Monitoring schedule quality
 - Other project metrics as determined by the PMO

- Controlling Performance:
 - Change Control

The diagram below illustrates and summarizes the overall approach:

Figure 1: VoteCal Schedule Management Approach



2.2 Roles and Responsibilities

This section identifies the primary project staff actively involved in scheduling the work of the project and analyzing schedule performance. For the remainder of this document, these roles will be collectively defined as the VoteCal Schedule Team. The roles for the VoteCal Schedule Team are detailed in the table below.

Table 1: VoteCal Schedule Team Roles & Responsibilities

Role	Responsibility
VoteCal Schedule Manager (Schedule Manager)	<p>The Schedule Manager is a Project Manager within the PMO with the following responsibilities:</p> <ul style="list-style-type: none"> • Provides leadership and direction for the daily management of the CPS. This includes processes, procedures, controls and reporting. • Incorporates all VoteCal team schedule updates into the CPS in accordance with the reporting cycles defined in this plan. • Tracks project status and reports variances as defined in this Schedule Management Plan (SMP). • Works with the VoteCal Project Team and maintains the SOS Schedule. • Works with the VoteCal project teams and maintains the CPS. • Communicates schedule variances and non-conformance of the team schedules to the VoteCal Senior Project Manager (Sr. PM) and VoteCal Project Director (PD). • Coordinates schedule baseline adjustments and scope additions to the CPS via the change control process. • Communicates schedule status to the VoteCal Project Team and other stakeholders as appropriate.
VoteCal System Integration Contractor (SI) Project Manager	<p>The SI PM or a designee:</p> <ul style="list-style-type: none"> • Responsible for construction and maintenance of the SI's Integrated Project Schedule (IPS). • Develops the SI's Schedule Management Plan which will detail the SI contractor's approach to schedule management. • Owns all SI schedule content representing VoteCal work being performed as detailed in the VoteCal Statewide Voter Registration System RFP. • Ensures SI's schedule meets VoteCal schedule guidelines provided in the SMP and as directed by the SOS VoteCal Schedule Manager and Sr. PM. • Provides analysis as needed on all schedule impacts including external milestones outside the scope of SI development. • Provides schedule status reporting to the VoteCal PMO on all SI deliverables.

Role	Responsibility
<p>VoteCal Elections Management Systems Staff</p> <p><i>Note: There are currently three EMS vendors. Each will be responsible for developing and remediating its system within the timelines mandated by contractual agreements with SOS for the VoteCal project.</i></p>	<p>Under the direction of the PD and the Sr. PM, the EMS Staff:</p> <ul style="list-style-type: none"> • Develops, maintains, augments and updates the EMS schedule in accordance with this plan. • Provides analysis of impacts to EMS schedule for internal and external project dependencies. • Reviews deliverables to ensure that they are aligned with defined standards, SOS's needs and contractual requirements. • Participates in regular VoteCal meetings regarding schedule subject matter. • Develops schedule reports in accordance with contractual obligations. • Follows the processes and procedures defined in the SMP.
<p>VoteCal County Elections Officials Staff</p>	<p>Schedule management role of county elections officials' staff will be provided in this row once more information is available.</p>

3 Standards for Schedule Structure and Content

There are multitudes of separate development efforts that will be coordinated, integrated and executed through different teams in order to build, test and deploy the VoteCal System. To do so, VoteCal will have a process in place to distribute, collect, update, integrate and report on project schedule data. This section details how various schedules are used to provide an overview of the various development efforts planned and completed by each team.

3.1 Individual Schedules and Data Relationships

The table below describes schedule components and their purpose.

Table 2: VoteCal Schedules

VoteCal Project Schedule Component Name	Description
Consolidated VoteCal Project Schedule (CPS)	The CPS provides the overall roadmap for VoteCal. This schedule is used to manage all VoteCal team schedules collectively. Each schedule will have a sub-set of activities; deliverables and other key activities identified, that when brought together in the CPS provide an overall view of the VoteCal project. These activities are synched with the individual schedules each reporting period and project progress analyzed.
SOS Individual Project Schedule (IDPS)	This schedule will contain details of all activities performed by the SOS VoteCal teams and key activities will be identified, that together with the SOS VoteCal schedule, the SI schedule and EMS schedules provide an overall view of the VoteCal project. These activities are synched with the CPS each reporting period and project progress analyzed.
SI Contractor's VoteCal Integrated Project Schedule (IPS)	The VoteCal Integrated Project Schedule (IPS) is maintained by the SI and will include at a minimum all SI VoteCal Deliverables and critical in scope work required to build the VoteCal Solution. Key activities will be identified through a collaborative process to include the VoteCal PMO that together with the SOS and EMS schedules will provide an overall view of the VoteCal project. These activities are synched with the CPS each reporting period and project progress analyzed.
VoteCal Elections Management Systems' Individual Project Schedules (IDPS)	The VoteCal Elections Management Systems Schedules, generated by each EMS vendor will detail the work and key project milestones, at a minimum. Key activities will be identified, through a collaborative process to include the VoteCal PMO that together with the SOS and SI schedules will provide an overall view of the VoteCal project. These activities are synched with the CPS each reporting period and project progress analyzed.
VoteCal County Business Process Schedule (CBPS)	This row will be populated once more details are available.

3.1.1 Schedule Data Relationships

During the schedule management process the Schedule Manager must be able to easily extract data from the individual project schedules. This will be accomplished by having tasks that are common to team schedules and the CPS. Such tasks are termed “touch point” tasks. Having such correspondences between team schedules and the CPS enables the PMO to, in a straightforward fashion, extract status updates from team schedules and update the CPS to reflect a consolidated view of project progress.

The specific tasks that serve as touch point tasks will be selected by the PMO, based on the individual team schedule content, the team’s specific deliverables and complexity thereof, consideration of SOS executive reporting requirements, and discussion with the Schedule Manager for the team schedule. Touch points are identified based on the following criteria:

- All VoteCal contractual deliverables and work products.
- Inter-team dependencies or communication points that either receive or provide deliverables to one or more other teams.
- Key cross team dependencies and critical hand-offs.
- All other key activities on individual schedule’s critical paths that can have marked effect on the overall schedule progress, and
- Other critical tasks deemed required by the Schedule Manager for schedule management activities.

Thus touch points can be individual tasks, milestones, summary tasks, and/or detailed tasks in any individual schedule

3.2 Standards for Individual Schedules

The tasks and activities required to complete a deliverable should be identified and built out based on schedule standards in this Plan. The VoteCal schedules should contain all of the information required to manage their respective areas of the project but not so much detail as to make them difficult to manage. VoteCal will execute Critical Path reporting and all activities should be networked based on the logical connections between tasks. Consistent and logical relationships will enable the team to see downstream impacts if tasks start to slip from the baseline dates.

3.2.1 Standard Work Breakdown Structure (WBS)

For touch point tasks to represent the same information in the CPS and the team schedules, each conforms to a standard hierarchy. Therefore, the phases, deliverables and work products in all VoteCal team schedules follow a uniform work breakdown structure (WBS). In addition, each touch point task in a team schedule is identified in MS Project by means of setting a customized MS Project flag. The standardized WBS in conjunction with the use of flag settings allows PMO to filter team schedules in order to quickly locate the team schedule touch point tasks that correspond to each touch point task in the CPS.

The foundational structure of all the VoteCal Project schedules is based upon the standard WBS hierarchy described in this section. Collectively, this represents the entire VoteCal scope. The expected standard WBS hierarchy for all VoteCal schedules is provided below. Each schedule is required to be aligned and configured in the same manner to enable valid comparison of schedule data and metrics.

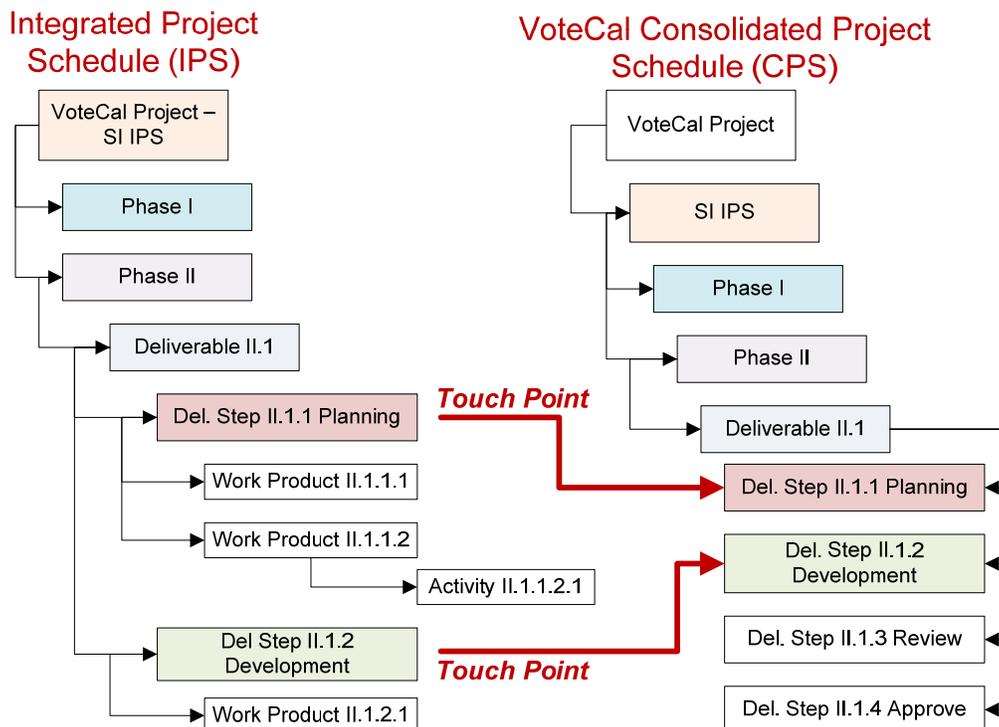
VoteCal Work Breakdown Structure (WBS):

- 0 **Project** – VoteCal Project level summary task, SI project level summary task, or EMS/Team project level summary task
- 1 **Phase**– corresponds to a VoteCal Phase as defined in the VoteCal RFP
- 1.1 **Deliverable** – typically corresponds to a Deliverable that is specified in the team’s contract
- 1.1.1 **Deliverable Step** – one of a series of to-be-defined steps that will describe the planning, development, review, and approval of a Deliverable
- 1.1.1.1 **Work Product** (as necessary) – a smaller output of a Deliverable Step, such a use case or a document
- 1.1.1.1.n **Activity** (as necessary) – a discrete component of work required to complete a Work Product, such as use case draft preparation or document review.

At a minimum, the tasks selected as touch point tasks in a team schedule (and therefore the touch point tasks in the CPS schedule data for that team) include every contractual deliverable and critical hand-off in the team schedule. For many deliverables, additional lower-level tasks in the team schedule may be designated as touch points. Whether and which additional specific tasks will be designated as touch point tasks, depends on the nature, quantity, complexity and duration of activities required to complete the deliverable.

The diagram below illustrates touch points between the SI contractor’s IPS and the CPS for Deliverable II.1 at the Deliverable Step level. The IPS Deliverable Step tasks are reflected as CPS detail tasks. This is a hypothetical example showing a minimum set of touch point tasks for a deliverable. As stated earlier, there will be cases where tasks at the Work Product level, or both the Work Product and Activity levels, also serve as touch point tasks.

Figure 2: Example CPS-IPS Touch Points



3.2.2 Task Naming Conventions

The VoteCal Project Schedule task naming conventions are as follows:

- Descriptive but as brief as possible
- Action-oriented (Build, Design, Review, Distribute, etc.)
- Unique
- Reference the deliverable where applicable (e.g. all Deliverable 1 tasks have a D1-prefix)

3.2.3 Network Development Process

Outlined below is the standard schedule development process that the VoteCal Schedules will follow:

1. Define Deliverables and Tasks.
2. Sequence Deliverables and Tasks.
3. Estimate Task Durations.
4. Assign Resources [for CPS, resources would be individual teams or team leads or team representatives].
5. Review task duration and resource assignments to ensure resources will be available when required to keep the schedule on track.
6. Review schedule to determine compliance with the standards outlined in this plan.
7. Obtain approval to publish the schedule.
8. Baseline approved schedule.

3.2.4 Schedule Development Standards

The tasks identified in the schedule describe the activities required to support each WBS element.

- Decompose tasks (work packages) to a duration of between two weeks (or 80 hours) and four weeks (or 160 hours maximum).
- Twenty business days prior to the start of each phase all tasks should be detailed to the work package level. Tasks for later phases can be at a higher level, with longer durations.
- In certain instances, tasks may need to be scheduled and tracked in increments smaller than the guidelines provided in this plan. However, every attempt should be made to keep the use of very short duration tasks to a minimum. This level of detail ensures three things:
 - That the status of each task is easily measurable,
 - Tasks are not so large that the schedule is reliant on status alone, and
 - There is not so much detail that the schedule becomes unmanageable.
- Tasks in the VoteCal schedules are fixed duration and primarily effort driven, with the exception of training classes and similar activities.
- Summary tasks must not have predecessor or successors.
- Detail tasks should have at least one predecessor and one successor assigned unless they are the first or last in the schedule or use a Start No Earlier Than date constraint.
- Milestones will have a predecessor and successor assigned, unless at the end of the project.

- Task dependencies should be based on logical relationships; Finish to Start, Start to Finish, Start to Start, Finish to Finish. Task constraints, where possible will be set to 'As Soon As Possible'. Where a date constraint is absolutely necessary, only the Start No Earlier Than constraint type should be used. Exceptions should not be common, but if and when they occur the reason should be noted in the Notes field. Critical dates will be entered as deadlines within the schedule tool rather than as hard constraints.
- Milestones will be entered into the schedules with duration of zero days.
- Task should be action-oriented (see naming conventions) and have a measurable output to ensure the resource assigned is clear as to what is required upon completion of the task. For example, create reports to management, build pieces of code for an application, create project definition documents, etc.

3.2.5 Resource Standards

The following general standards will be used to define and assign resources:

- The VoteCal project schedules will include resource loading of all contractors (including SI, EMS vendors, other State departments, Independent Verification and Validation, Quality Assurance etc.), unless otherwise agreed upon by the Sr. PM.
- Resources will be assigned to tasks at a detail level; no resources will be assigned to summary tasks or milestones.
- The duration for each task should be between two weeks (or 80 hours) and four weeks (or 160 hours maximum), with the exception of milestones, with a zero duration
- As a guideline, contractor resources should not exceed 120% allocation across all active schedules in the resource pool; State resources should not exceed 80% allocation.

3.2.6 Project Schedule File Location

The VoteCal Project Schedule files are located in VoteCal Project Library share drive, at the path mentioned below.

\\sosfps4\sOS_SHARE\Projects\HAVA\SWDb\VoteCal\Proj Mgmt\Sched Mgmt\Official VC Schedule

3.3 Additional Standards for CPS

3.3.1 Milestones

Various milestone categories are used within the CPS to help manage specific key events. Milestones will be used in the CPS to track these key points. A similar approach is highly recommended for all individual project schedules. Definitions are as follows:

Milestone Definitions

The following section details how the milestone, deliverable and other terms are applied to the CPS. The different terms and key events include:

- Milestone (M) = A Milestone is a significant point or event in the VoteCal Project. Milestone tasks have a zero-day duration.

- Significant is an important designation as too many milestones can bloat a schedule and make it difficult to read and harder to identify items of importance.
- Milestones will exist one level lower than the summary tasks they are representing the completion of.
- This allows a full collapse of sections that are 100% complete and drastically improves schedule readability as the project grows and the CPS becomes more complex.
- Phase Milestone (PM) = Denotes completion of a Phase (e.g. Phase I – Initiation and Planning Complete).
- Deliverable Milestone (DM) = Denotes the completion of a deliverable as defined in a DED or some other contractual document.
- Inter-team Dependency Milestone (IDM) = A milestone indicating dependency on an activity across VoteCal Project team schedules.
 - For individual team schedules, it is recommended that the respective project managers clearly identify all external dependencies.
 - It is also recommended that the team schedules clearly differentiate between deliverables and receivables when identifying dependencies.

Milestone Designations

Custom flags are developed within MS Project to flag key detailed or summary tasks. MS Project 2007 allows the user to assign Yes/No properties to these flags. The flags are used to manage and report on the CPS. Detailed usage of the flags is described in a subsequent section of this Plan. Once custom flags have been set within the schedules, reports will be generated based upon the distinctions as detailed in Table 5.

Table 3: Custom Flag Fields

Flag#	Title	Notes
1	PM = Phase (SDLC) Milestone	Helps keep track of key Phase Dates for the Project.
2	DM = Deliverable Milestone	Helps keep track of key Deliverable dates.
3	M = Milestone	Any significant event that does not qualify for a PM or DM
4	Y = Touch point	Tasks to be synched with CPS
5	IDM = Interdependency Milestone	Helps keep track of project dependencies
6 – 20	<Reserved for future use >	May be reserved for future milestone designations or other schedule sorting needs for the project.

3.3.2 MS Project Customizations

Custom text fields are assigned to various fields used to manage VoteCal. These fields will not be used for purposes other than those assigned. If a custom Text field is needed, the field will

be renamed to alert other MS Project users to its intended purpose to ensure data is not unintentionally overwritten.

Table 4: MS Project Custom Fields and Tables

Custom Field, Table or View Name	Description
Custom Text Fields	
Text1	More details on usage of text fields will be added in later versions of this plan.
Text2	
Text3	
Text4-9	
Text10	Forecast Completion Date
Text 11	Saved Start Date
Text 12	Saved Finish Date
Text 13	Saved Work
Text 14	Saved Duration

3.3.3 Task Notations

During the course of a project it becomes necessary to notate task specific information within the schedule that is of high importance to the entire project team from either a reporting and/or a historical perspective. There are two specific fields within the schedules that are used to document this information.

Table 5: Schedule Notations

Field Name	Designation	Description
Notes	Historical	Where applicable, MS Project “Notes” are added to individual VoteCal Project work products or tasks which will document specific estimating techniques, business rules, exceptions and/or points of clarifications. The author will note the date on which the notes were entered along with their initials. Information in this field is retained for the lifetime of the schedule. New notes for a task are placed above existing notes in the following format: DDMMYY_AZ – NOTE The AZ depicts the author’s initials.
Comments	Reporting	A “Comments” field will be created for the VoteCal schedule files using one of the Text Fields. It can be added as a column to any view or accessed directly through a custom view developed to display information for the VoteCal Project Team. This is a text field that will display current supplementary information regarding task status. For instance, if a task has a yellow or red status, the Comments

Field Name	Designation	Description
		field will contain information as to the corrective action(s) being implemented to bring the task back on track.

3.3.4 Resource Name

For the CPS, resources for a particular activity will be represented by a team name. To facilitate this, the Resource Name field in the CPS will be used to record and identify the team responsible for executing a particular task. All other Resource related values will also represent a team, rather than an individual team member. Other VoteCal schedules will resource at an individual resource level to support work assignments and detailed task management.

3.3.5 Project Calendars

All VoteCal project schedules will use a Standard Calendar that includes all California State Holidays. All scheduled tasks will default to this calendar.

3.4 Construction and Elaboration of Schedules

This section describes how various schedules are created, elaborated and integrated into a Consolidated Project Schedule (CPS). Initial schedule development for SI schedule and the CPS will be completed within 90 days of the SI contract execution. Upon initial acceptance, touch points in the IPS are used to construct the CPS. Initial versions of all other schedules are completed as per the specific team contracts with SOS. The SOS IDPS is an ongoing schedule that is used to plan and track SOS activities.

During progressive elaboration of individual schedules, summary placeholder tasks (where the additional detail is being elaborated) must remain largely unchanged in terms of Start Dates, Finish Dates, and Duration. This means although detailed tasks are added, the net Duration field of the summary tasks should remain approximately the same. This is known as Rolling Wave Planning. VoteCal schedules will be fully defined for the current and upcoming rolling-wave planning window and progressive elaboration of upcoming windows will occur at least 20 days before the start of that planning window.

In instances where progressive elaboration changes the high level dates or duration of an activity, or increases the work effort by more than 10% the updates will be submitted through the Schedule Management Change process (see section 3.4.2) so that impact can be fully determined and risk assessed.

3.4.1 Integrating Team Schedules into the CPS

Using the standard WBS defined in this plan, the Schedule Manager will construct the CPS by developing a network of touch points from all of the individual team schedules. These touch points will highlight key inter-team dependencies, various VoteCal milestones, and other activities deemed critical for project success by the PMO. After its initial construction, the Schedule Manager will integrate individual team schedules into the CPS as and when they become available.

During subsequent and ongoing development of the schedules, new detailed tasks will be elaborated as they are added to the schedule. If any new task is added to the individual team schedule at the touch point level, the CPS will be updated in accordance with this plan.

3.4.2 Schedule Management Change Control

Bi-weekly schedule updates will occur in a working copy of the CPS. Schedule activities will be analyzed through completion of an Impact Assessment, for down stream impact and when changes occur to deliverable dates or other key activities the Schedule Manager will initiate the Schedule Change Process. Schedule Change ensures that the changes are valid and updates have been applied correctly prior to submittal to the Sr. PM and PD, by adding a validation step to the analysis and impact. When complete, the VoteCal Impact Assessment will be copied to the Sr. PM, PD and Contract Manager, at a minimum, and a meeting scheduled to make the final determination as to how schedule variances and downstream impacts will be addressed.

The Impact Assessment will detail actual variances reported in the CPS and potential variances identified through analysis. Actionable outcomes from the meeting include mitigation planning with the SI or EMS or where key dates have slipped and Change Control thresholds have been reached, or SOS requires an extended period of time to review the deliverable, the variance will trigger Change Control as per the Change Control process. If variances are below the Change Control thresholds the Sr. PM will make a recommendation, based on the Impact Assessment, to the PD, regarding any required action. At all points throughout this assessment process the Contract Manager will have visibility to the findings so that contractual compliance can be monitored.

When Change Control is executed, the VoteCal PD will provide final approval to communicate changes to the project stakeholders via the VoteCal Change Control Board. The preliminary steps are essential in ensuring that data is accurate and that no one is surprised by the Change Request.

3.4.3 Schedule Approvals

A walkthrough of each new schedule file will be conducted by the team generating the schedule, with the Schedule Manager, prior to new schedules being submitted for approval. The Schedule Manager will work with the individual teams to ensure that feedback from the VoteCal Schedule Team is incorporated into the schedule prior to release.

3.4.4 Baseline Standards

All tasks must have a baseline set in the schedules. The initial baseline is set upon schedule approval. Once initial baselines are set, only an approved VoteCal Project Change Request permits them to change. When tasks are added to a schedule through progressive elaboration, the individual team lead will baseline at a task level and summary task level. This will help Schedule Manager to measure variances at later stages. The Project baseline information will be established so as to assist in tracking planned versus actual variance data. Baseline information will be stored using MS Project for all VoteCal schedules. Maintaining baseline information will ensure:

- Variance to plan can be effectively measured at all times
- Important tasks will show up in variance reports.

Baseline Sequence

A new baseline will be established and monitored upon approval of any Special Project Report (SPR) or approved change control. If an SPR is approved, the information contained within the report will be saved to an available baseline archive field and this new baseline will replace the default MS Project Baseline field.

The following information identifies the sequence in which baseline information will be saved in the VoteCal project schedules:

1. Preliminary estimates for each phase outlined in the SPR will be used for the initial project baseline.
2. Once new schedules are approved for implementation, a new baseline will be established.
3. Any subsequent adjustments to the baseline must be approved through the SOS VoteCal Project Change Control Process or via a newly approved SPR.
 - a. This includes approved DEDs that may augment existing baselined dates.
4. Any progressively elaborated tasks defined in an approved DED will replace summary level task placeholders and further task decomposition.
 - a. The Start, Finish, Duration and Work for these summary tasks should remain the same (e.g. the detailed tasks should be performed within the timeframe of the summary level task placeholders and add up to the same data as the placeholders).
 - b. Again in instances where progressive elaboration changes the high level dates or duration of an activity, or increases the work effort by more than 10% the updates will be submitted through the Schedule Management Change Control process (see section 3.4.2) so that impact can be fully determined and risk assessed, prior to submission to VoteCal Project Change Control.
5. Only tasks added to a schedule through change control or step 4 above will be baselined.
 - a. Originally approved tasks should retain their existing baselines.

Current Baseline Fields

VoteCal currently stores information in following baseline fields. The following highlights what information is stored in each:

1. **Baseline** – (MS Project Baseline – denoted for VoteCal by the underlined B): Baseline is the active schedule baseline and contains the most recent baselined schedule information. This is the baseline that is used to produce all VoteCal variance reports.
2. **Baseline 1 – 10**: Represents the estimated dates and effort updated via approved change control. At that time Baseline data will be copied to the Baseline1 field and new Baseline information will be saved. As additional changes are approved the Baseline number will be incremented by one

3.4.5 Incorporating Approved Work into Schedules

Once approved, new work will be incorporated into the appropriate schedule (SI, EMSS, etc). The updated schedule will be incorporated into the CPS as part of the bi-weekly integration process defined earlier.

4 Schedule Update and Tracking

The CPS, IPS and IDPS will be updated bi-weekly. This includes modifying the Project Status Date field (within the MS Project Tool) to report the appropriate status.

4.1 Updating All Schedules

Progression for all schedules on the VoteCal project will be based upon the duration required to complete an activity. Individual teams will be required to track Actual Duration, Remaining Duration and Forecast Completion Date for activities. This will allow Microsoft Project to automatically measure % Complete at a Deliverable level.

The Schedule Manager will use a Status Update Sheet for collecting progress updates for the SOS IDPS, example headers for the worksheet are as follows.

Table 6: Schedule Status Sheet Headers

Status Sheet Headers
Unique ID
Task Name
Percent Complete
Duration
Start
Finish
Actual Start
Actual Finish
Forecast Completion Date

4.1.1 Collecting CPS Status from Teams

During VoteCal project's lifecycle the key indicators demonstrating the overall health of project will be the progress made by individual team(s) on the CPS and respective schedule's critical path activities. The PMO at all times need to know the advancement on critical inter-team dependencies and other touch point activities. Bi-weekly, each team will need to submit the updated schedule files to the PMO. It is the responsibility of each team's schedule manager to ensure that their schedule status information is accurate prior to submission to the Schedule Manager.

Each schedule file will be saved in MS Project 2007, in a "CPS Update View" that filters tasks where Flag 4 equals Yes and at a minimum displays the following columns; ID, Name, Duration, Actual Duration, Remaining Duration, Start, Actual Start, Finish, Actual Finish, Forecast Completion Date (Custom Text Field 10).

In addition to critical activities, each schedule will have a 'give' and 'get' external milestone assigned. Milestones that deliver and will impact another schedule are identified as 'give'. Milestones that show dependency on other team's deliverables are identified as 'get' tasks.

Following minimum fields have been identified currently for the schedule status sheets:

Updated schedules are due from each VoteCal team by noon on Monday for a Status Date as of the previous Friday. For example, if the Status Date is Friday 5/5, the project schedules are due noon the following Monday, 5/8.

4.1.2 Updating the CPS

The Schedule Manager will check each schedule for compliance. The Schedule Manager will update the CPS for information around all touch points. The Schedule Manager will:

- Advance the Project Status Date.
- Copy the Start Date, Finish Date, Work and Duration into Text 11 through 15 prior to updates, to ensure static point against which to evaluate impact to CPS.
- For activities starting in the current reporting period, update the Actual Start date.
- For activities started and in progress during the current reporting period, update the Actual Duration field based on the number of days passed since the activity started.
- For activities in progress where a Forecast Completion Date is provided, in addition to updating the Actual Duration for the number of days passed since the activity started, increase the Remaining Duration so that the Finish Date equals the Forecast Completion Date MS Project will calculate the % Complete and all other related fields for this task.
- For activities ending in the current reporting period, enter the Actual Finish date.
- Make adjustment as per any additional comments from the reporting team in the comments field.

4.1.3 Schedule Update Timeline

After updating the CPS, the Schedule Manager will perform a series of checks to ensure all tasks remain unaffected from the integration, and any emerging negative trends are identified. After the CPS schedule data has been validated the VoteCal Schedule Status Reports will be generated and circulated by COB on Wednesday. Managers and staff are expected to review the reports and prepare for the VoteCal Schedule Status Meeting on Thursday. On the following Friday, the cycle starts anew. The table below provides a summary of the schedule integration process.

Table 7: Schedule Update Timeline

Process	Day and Time
Schedules Due	Monday Noon
Update CPS	Wednesday COB
Perform Analysis	Thursday through Tuesday COB
Generate Reports	Tuesday COB

Process	Day and Time
Review Reports	Wednesday COB
Distribute Reports	Wednesday COB

4.2 Schedule Integrity and Quality

The process of performing updates and entering data into Microsoft Project 2007 can and will occasionally adjust data in a manner that is not desirable. It is the scheduler's duty and that of the responsible project management team to make adjustments to each schedule under ownership. This makes certain the data reflects the actual progress and forecast of the underlying effort.

Each schedule presented to the Schedule Manager must have undergone all analysis prior to its submission, by the owning team. Schedules are due for submission by noon PST every other Monday.

4.2.1 Schedule Quality Management Audits

To efficiently track the health of the VoteCal project, it is important to make certain that all of the team schedules accurately reflect the VoteCal Scope of Work. During the reporting cycle schedule data is updated by the team specific schedule owner, and reviewed by key members of the owning team to ensure accuracy prior to submission to the Schedule Manager.

Regular schedule audits will be performed by the Schedule Manager to ensure that all individual team schedules are aligned with this SMP. Schedule audits will evaluate the integrity of individual schedules and conformance to the project goals and objectives. Audits will be performed:

- As soon as the schedule is created and before the first baseline is established. This will give the Schedule Manager a chance to review and recommend changes to the schedule before variance tracking begins.
- After establishing the first baseline, the Schedule Manager may perform an audit when a scope change is approved and the schedule re-baselined.
- Once at the end of every calendar month.

Schedule audit findings will be shared by the Schedule Manager with the PD, the Sr. Project Manager, and the individual team's schedule manager. The audit will be performed to determine:

- Does the schedule continue to follow the standards defined in this SMP?
- Does the presented schedule continue to satisfy the team's Statement of Work?
- Does the schedule clearly identify inter-team dependencies?
- Is the scheduling logic as per industry best practices?
- Do the schedule completion estimates, resource allocation, task sequencing, and critical path demonstrate reasonableness (fair and rational)?
- Does the schedule closely follow the original duration and work effort estimates made by the team?
- Are any activities missing a baseline?
- What are the effects of baseline revisions on the changed team schedule, CPS and other dependent team schedules?

Should the audit find any of the above, or indicate that best practice project scheduling is not

being followed, corrective actions will be requested by the Sr. PM with the expectation that they are addressed within an agreed to timeframe.

4.2.2 Graphical Status Indicators in CPS

All VoteCal schedules will use Graphical Status Indicators visible in the “CPS Update View” to provide a quick view of the schedule progress. The indicators are generated via a formula that corresponds to the color and shape definitions listed below.

All summary or milestone tasks that have Yellow Circle or Red Minus Sign status indicators will have a comment in the schedule comment field when the schedule is submitted to the Schedule Manager. The comment will note the reason for the tasks delay and the corrective action currently under way.

- **Blue Check Mark Indicator:**
 - Task/Deliverable/Milestone/Schedule is complete
- **Green Diamond Indicator:**
 - Task has started; Finish Date is in the future
- **Yellow Circle Indicator:**
 - Task should have started; Finish Date is in the future
- **Red Minus Sign Indicator:**
 - Task is beyond scheduled completion date

Currently this formula is calibrated to calculate from the projected Start and Finish dates because a baseline has not yet been established. Once the project has a baseline, the indicators will reflect performance compared to the Baseline data.

4.3 Maintenance Standards

Multiple work efforts will be tracked for VoteCal. This creates instances where schedules will become large and difficult to manage. In an effort to minimize the overall size of the schedule files and retain specific data in them, regular maintenance activities will be performed. Maintenance activities will consist of archiving specific project files for historical reference.

4.3.1 Bi-weekly Archiving of Active Schedules

The Schedule Manager will ensure that a copy of all current MS Project files are stored in the schedule archive folder immediately following the regular update cycle. The copy in the archive folder will include the current archive date extension. The files are located under the following folder path:

\\sosfps4\sOS_SHARE\Projects\HAVA\SWDb\VoteCal\Proj Mgmt\Sched Mgmt\Official VC Schedule\ Archive

4.3.2 Schedule Update Log

The Schedule Manager will maintain an active change log along with the schedule files. The change log will record key updates other than the bi-weekly status update to the CPS. The Log will record the following details for each update:

- Change Date
- Change Description

- New Baseline Information if any
- Additional Tracking Information and Notes

The path to the change log is:

\\sosfps4\sOS_SHARE\Projects\HAVA\SWDb\VoteCal\Proj Mgmt\Sched Mgmt\Official VC Schedule

APPENDIX A - Schedule Reporting and Analysis

The Schedule Management Process defines how the information in the VoteCal schedules is kept current and accurate. The Project Status Reporting Process defines what information is reported, to whom and when.

Having clearly defined schedule outputs for the project allows the team to compare schedule variances and capture a comprehensive view of performance progress on an as needed basis.

In addition to reports generated from team specific schedules, after the update and analysis of CPS, the Schedule Manager will generate a VoteCal Key Task Report from the CPS. This report will be supported by an Impact assessment which together will provide a comprehensive view of schedule progress and analysis.

The following list details the recommended schedule reports for the VoteCal Project. This list will be updated to reflect additional requirements as they are identified. These reports will help the VoteCal Management team ensure that the project will meet the SOS business objectives as defined in the VoteCal Charter and VoteCal Project Management Plan.

Each project team is encouraged to follow this set of reporting recommendations, but unless a specific report is marked mandatory, SOS will assume that, at a minimum, each specific team has a similar reporting process in place, and best practice is being actively followed.

The PMO will generate two levels of reporting. Level 1 Reports represent the SOS IDPS activities and Level 2 Reports represent the VoteCal CPS activities.

1.1. SOS Schedule Reports (Level 1 Reports)

The Project Schedule Manager will generate a set of reports each week from the SOS IDPS and disseminate the information to the project team. These reports will be referred to as Level 1 Reports. In general Level 1 Reports are detailed in nature and provide the team with a consolidated time specific view of activities within the SOS IDPS.

1.1.1. L1 – 3 Week Look Ahead Report

The L1- 3 Week Look Ahead Report is generated from the SOS IDPS and contains project activities which are currently in process and/or are scheduled to start within the next three weeks.

The L1 - 3 Week Look Ahead Report is a detailed report intended to help focus the team on activities currently in flight, or those scheduled to start within the next three weeks. Please click on the following link for an example of this report.

[L1-3 Week Look Ahead Report](#)

The report is generated on a weekly basis and published to the project team by noon each Thursday.

1.1.2. L1 - Late Task Report

The L1- Late Task Report is generated from the SOS IDPS and contains all project activities which are scheduled to finish after their Baseline Finish Date.

The L1 – Late Task Report identifies the difference between how the work was originally scheduled and how it is actually being executed. Comparing the Baseline Finish Dates to currently scheduled Finish Dates allow PMO and leads to identify tasks that are running behind and apply corrective actions as needed. Please click on the following link for an example of this report.

[L1-Late Task Report](#)

The report is generated on a weekly basis and published to the project team by noon each Thursday.

1.1.3. L1 - Key Task Report

The Key Task Report is generated from the SOS IDPS and provides an overview of key deliverables, work products, tasks and milestone dates, in addition to a Graphical Status Indicator. This report is intended for the Sr. PM, PD and Division Chiefs and it provides a high level overview of SOS progress. This report will be also copied to the VoteCal Project Team, allowing team leads to relate their areas of activity to the project overall, and identify impacts of actual or potential schedule slippage. Please click on the following link for an example of this report.

[L1- Key Task Report](#)

The report is generated bi-weekly every other Wednesday by Noon.

1.2. VoteCal Schedule Reports (Level 2 Reports)

The Schedule Manager will also generate a set of reports from the CPS every two weeks and disseminate the information to the VoteCal, SI, EMS project teams. These reports will be referred to a Level 2 Reports.

1.2.1. L2 - Late Task Report

The L2 - Late Task Report is generated from the CPS and contains all project activities which are scheduled to finish after their Baseline Finish Date.

The L2 – Late Task Report identifies the difference between how the work was originally scheduled and how it is actually being executed. Comparing the Baseline Finish Dates to currently scheduled Finish Dates allow project management to identify tasks that are running behind.

The report is generated on a bi-weekly basis and published to the project team every other Wednesday by COB.

1.2.2. L2 – Key Task Report

The L2 - Key Task Report is generated from the CPS and provides an overview of the key deliverables, work products, key activities and milestones for the VoteCal project, in addition to

The report is generated on a bi-weekly basis and published to the project team every other Wednesday by COB.

1.3. VoteCal Schedule Analysis

After the CPS update the Schedule Manager will perform analysis to evaluate the impact and implications of variances between the baseline and current schedule. Based on the CPS, the schedule manager will determine the overall progress of the project and identify potential issues by evaluating schedule performance metrics described in this section.

The Schedule Manager will generate a schedule metrics analysis worksheet and schedule analysis data will be extracted, graphed, trended and distributed, as needed.

The Schedule Manager may use the following metrics to perform schedule analysis, in addition to other best practice as deemed necessary by the Schedule Manager, if risks and negative trends become apparent:

1.3.1. Schedule Metrics

Table 8: Schedule Metrics

Measure	Description
Percentage Complete	Percent Complete = (Actual Duration / Duration) * 100
Completed On-time Percentage	Number of Tasks (excluding summary tasks) where the Finish Date = Baseline Finish/Total Number of Tasks (excluding summary tasks) *100
Completed Late Percentage	Number of Tasks (excluding summary tasks) where the Actual Finish > Baseline Finish/Total Number of Completed Tasks * 100
Planned to Actual Percentage	Number of Tasks (excluding summary tasks) where the Baseline Finish Date < or = current date/(Number of Tasks (excluding summary tasks) where the Actual Finish Date < or = current * 100
Planning Completeness	Total Number of Tasks (excluding summary tasks)/ Number of Tasks where the Created Date > or = the Start Date of the Summary Task *

Measure	Description
	100
Cumulative Work Hours Trending	Total Work Hours (Level 1 WBS) NOTE: This number can be tracked month to month and trended.
Resource Allocation	Number of Actual Resources * Allocation percentage/Work
Growth in Baseline Work	Baseline Work – Total Work NOTE: This number or a calculated percentage can be tracked month to month and trended.
Total Work Variance in Hours for Tasks Completed over Past Month	Work Hr Variance for Tasks where Actual Finish = Current Month NOTE: This number can be tracked month to month and trended.
Number of Late Start Tasks	Number of Tasks where Planned Start = Current time period and Percent Complete < 1%
Percentage of Late Start Tasks	Number of Tasks where Planned Start = current time period and Percent Complete < 1% /Total Number of Tasks = current time period * 100
Number of Late Finish Tasks	Number of Tasks where Planned Finish = Current time period and Percent Complete < 100%
Percentage of Late Finish Tasks	Number of Tasks where Planned Finish = current time period and Percent Complete < 100% /Total Number of Tasks = current time period * 100
Number of Tasks with Missing Predecessors	Number of Tasks without Predecessors
Number of Tasks with Missing Successors	Number of Tasks without Successors
Missing Predecessors or Successors	Number of Tasks without Predecessors or Successors

The exact structure of the VoteCal schedule analysis report will be detailed in later versions of this plan. The report will be distributed to the Project Director by the Sr. Project Manager via email or as appropriate.

1.3.2. Other Analysis

Besides these metrics the Schedule Manager will analyze the schedule to:

- Look for inconsistent or improper status of future activities.
- Missing status for any activities (especially ones that are known to be physically completed).

- High deviation from milestone planned dates.
- Key comparisons post update including but not limited to: current number of total CPS tasks, number of completed tasks in CPS, number of future tasks, current VoteCal scheduled completion date, and % Milestone activities completed.

Should this analysis find any of the above, or indicate that best practice project scheduling is not being followed, corrective actions will be requested by the Sr. Project Manager with the expectation that they are addressed within an agreed to timeframe.

1.4. Reporting Schedule Status

After schedule update and analysis, a link to the SOS VoteCal Schedule Status Report will be circulated via e-mail to members of IPOC, IV&V, and a sub-set of the VoteCal Project Team. The report will be located in the following location under the subfolder with the date the report generation occurred (e.g. add the extension "_MMDDYYYY"):

\\sosfps4\Sos_share\Projects\HAVA\SWDb\VoteCal\Schedule\Reports